



# SECRETS TO FACILITATING STRATEGY

## TAKE A FACILITATIVE APPROACH TO BUILDING A SUCCESSFUL STRATEGY!

### WHY IT WORKS

#### Part I: Learning Strategic Planning *(Online)*

At your own pace, take the 4-6 hour online course to learn the Drivers Model — the Leadership Strategies comprehensive approach to strategic planning. Score 80% or above on the certification test to begin Part II.

#### Part II: Facilitating Strategy Sessions

Now that you know the model, join the other participants for a focused, three-day session to learn facilitation best practices and key techniques for working with strategy teams.

### LEARN IN PERSON HOW TO

- Get a team to visualize the future
- Facilitate a team in developing mission and vision statements
- Differentiate goals from objectives
- Create positioning statements
- Establish guiding principles
- Isolate critical success factors and barriers to success
- Develop action plans for implementation
- Design a communications plan
- Implement a monitoring strategy and accountability
- Avoid the ten pitfalls to developing a plan

### IDEAL FOR

**Facilitators / Consultants / Strategic Planners / Business Analysts / Project Managers / HR Professionals**

### DURATION

**PART I** *(Online)*: 4-6 hours, self-paced

**PART II**: Three Days, In Person

### SPECIAL FEATURES

- Online course with certification test
- Workbook chock full of tips and strategies
- Detailed facilitation guide giving you the step-by-step process with sample words, engagement strategies, starting questions and a sample deliverable
- SD Card with handouts and briefings to get you started right away
- Three practice sessions to provide you the confidence you need

# AGENDA

#### PART I SELF-PACED

- Overview of Strategic Planning
- Developing a Plan
- Preparing to Plan
- Implementing the Plan

#### PART II DAY 1

- Getting Started
- The Management Briefing
- Facilitating the Management Briefing

#### DAY 2

- Review
- The Situation Assessment
- Facilitating Strategic Direction Setting

#### DAY 3

- Review
- Facilitating Implementation Planning
- Facilitating a Monitoring Session

## **PART I: LEARNING STRATEGIC PLANNING** *(Online)*

Need to learn about strategic planning but don't have time for a traditional classroom course? Get started in hours, not days, with ***Springboard Online!***, the latest in online learning from Leadership Strategies — The Facilitation Company.

Learn strategic planning at your own pace!

- Combines audio & graphics to keep your interest high
- Interactive quizzes throughout to ensure learning as you go
- Chock-full of success strategies and quality checks to help you build your plan
- Online certification exam with randomized questions

You must score 80% or above to be certified to take Part II. This ensures that all participants in Part II understand the strategy model and are ready to focus on the key facilitation strategies. You can review the online material and take the certification exam as often as you need prior to the PART II session.

### **PART I CONTENT**

#### **Overview of Strategic Planning**

- The Level 3 Leader
- The Drivers Model
- The Components of a Strategic Plan
- The Strategic Questions
- The Three Levels of Planning
- The Ten Pitfalls to Avoid in Planning

#### **Developing the Plan**

- Mission and Vision – The Difference
- Converting Values into Guiding Principles
- Defining Your Goals
- Positioning Strategies
- Establishing SMART Objectives
- Identifying Critical Success Factors
- Removing Barriers
- Developing Strategies
- Prioritization and Action Planning

#### **Preparing to Plan**

- The Sigmoid Curve and Paradigms
- Steps for Preparing for the Plan
- Selecting Planning Team Members

- Developing the Situation Assessment
- Measuring Customer Satisfaction
- Employee Views and Culture
- Competitor Analysis
- Industry Trends
- Key Situation Statistics
- Critical Assumptions
- Developing the SWOT

#### **Implementing the Plan**

- Gaining Buy-in
- The Communications Plan
- Monitoring the Plan
- Grading Your Progress

## **PART II: FACILITATING STRATEGY SESSIONS**

In this segment, you join the other participants for a three-day session focused on strategies for facilitating teams through strategic planning. Techniques from ***The Effective Facilitator*** serve as the building blocks for the session. Therefore, taking this course in advance is helpful but not required.

Using a detailed facilitator guide, you and your classmates will facilitate a fictitious company, “The Light Touch Company,” through the development of a three-year strategic plan. Through the various role plays, you will have opportunities to:

- See the various components of the strategy model facilitated live
- Use the detailed facilitator guide to assess your skills in facilitating strategy teams
- Understand the issues that typically arise in facilitating strategy

Share your experiences and learn from the experiences of others in facilitating strategic planning

#### **Facilitating the Session – A Detailed Facilitator Guide**

- Techniques for engaging the group right from the beginning in strategic issues
- Tips for educating the group while facilitating the strategic plan development
- When and how to use breakout groups for the various strategy components
- In-class practice sessions in facilitating the strategy model
- Sharing experiences in strategic plan facilitation